

## Provide customers with a single point of contact to help them through the upgrade process

While homeowners may be interested in the benefits of an energy upgrade, many are deterred from completing an upgrade project because of the complex and unknown process. Often, a significant portion of homeowners who receive energy assessments do not continue with the upgrades. As part of the Better Buildings Neighborhood Program, multiple programs across the country tested a range of customer service strategies through a single point of contact to guide homeowners through the entire upgrade process. These program staff members are often called energy advisors or energy coaches and can provide a combination of services to help customers overcome barriers to home energy upgrades.

This approach – identifying barriers and providing targeted services through dedicated energy advisors to overcome them – has produced higher conversion rates and more satisfied customers; however, these services can also be time-intensive and increase the cost of program delivery. For more information on utilizing energy advising services to minimize informational, decision-making, and transactional barriers faced by homeowners, see [Energy Advisors: Improving Customer Experience and Efficiency Program Outcomes](#) [1].

- [EnergySmart](#) [2] in Boulder County, Colorado, found that having an energy advisor assigned to each program participant through the home energy upgrade process was a key to program success. Energy advisors built trust with the customer during an initial home visit and maintained a one-on-one relationship with homeowners throughout the process. Energy advisor services included installing low-cost measures, reviewing the assessment report and work scope, assisting with contractor selection, and helping with program paperwork. The relationship endured after the upgrade: after they completed their first upgrade, program participants frequently continued to stay in communication with energy advisors about additional projects and questions. Through customer surveys, Boulder found that 97% of customers rated their energy advisor as professional, knowledgeable, and timely. These customers agreed that “working with my Energy Advisor has been worth my time and effort.” In Boulder, around 60-70% of homeowners enrolled in the program took actions to upgrade their homes.
- Energy advisors for [Enhabit](#) [3], formerly Clean Energy Works Oregon, provided education, objective advice on the assessment report and work scope, and quality control to customers across nearly half of the state. Program staff helped customers initiate the process by scheduling a home energy assessment, and they provided a quality control review following upgrades. Advisors also monitored the progress of each project through internal project pipeline status reports, which helped reduce bottlenecks and minimize customer frustration. The energy advisor strategy helped Enhabit achieve a 94% customer satisfaction rating during the program pilot. Enhabit found that in some cases—such as having energy advisors present at assessments conducted by high performing contractors—the program could reduce energy advisor services without impacting customer satisfaction or reducing the number of upgrades completed. This knowledge allowed the program to reallocate their resources.
- The [Denver Energy Challenge](#) [4] provided customers with free energy advisor services starting with an initial phone call. The energy advisors helped customers by identifying available rebates and financing options, finding qualified home improvement contractors, reviewing bids, providing education on energy improvements, and even connecting qualified residents with other free or subsidized energy improvement services outside of the Denver Energy Challenge. As a result of this support, nearly 75% of customers who worked with an energy advisor went on to complete a home energy upgrade.
- [NeighborWorks of Western Vermont](#) [5] staff scheduled all contractor visits for its customers residing in small towns across Rutland County. Once contractors completed home energy assessments, energy advisors reviewed assessment reports with customers. This review helped customers understand the content of the reports and prioritize improvements to be undertaken based on their needs and budgets. Energy advisors helped customers apply for financing (as needed) – a common point in the upgrade process where projects stall – and move on to the next steps. The energy advisor acted as the customer's primary point of contact for information about the assessment and upgrade process. This approach contributed to the program's success in completing over 600 upgrades from 2010 through 2013.
- [Greater Cincinnati Energy Alliance](#) [6] (GCEA) energy advisors helped homeowners through every aspect of the upgrade process, from requesting an assessment to hiring a contractor. The program found that offering energy advising services through one individual person – the energy advisor – made potential customers more comfortable with the program, even if many customers did not actually contact the advisor. This hands-on customer service increased the number of completed upgrades and ensured that a high standard of quality was maintained throughout the process.

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**Source URL:** <https://rpsc.energy.gov/tips-for-success/provide-customers-single-point-contact-help-them-through-upgrade-process>

#### Links

- [1] <http://eetd.lbl.gov/sites/all/files/lbnl-1004070.pdf>
- [2] <http://www.energysmartyes.com/>
- [3] <http://enhabit.org/>
- [4] <http://www.denverenergy.org/>
- [5] <http://heatsquad.org/>
- [6] <http://greatercea.org/>